

# AUTHENTICITY

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*Cleveland*

BUSINESS TRADE SECRET:  
CONFIDENTIAL



# AMAZON HQ2 IN CLEVELAND

This proposal provides Amazon with the singular opportunity to develop an urban community in the heart of a compact, walkable and amenity-rich downtown bookended by the Cuyahoga River and Lake Erie. Our site features:

- **Initial build-out** (shown at right) of up to an estimated 4.7 million square feet of office space, including 877,000 square feet of existing space to accommodate Amazon's immediate needs and an additional 3.85 million square feet of new, build-to-suit construction. This site is unique in its centrality to downtown Cleveland, its proximity to rapid transit and the opportunity to expand from the core to reach the Cuyahoga River and Lake Erie waterfronts.
- **Unrivalled development flexibility** to expand beyond the initial build-out and to reach an estimated total over 10 million square feet, exceeding the required 8 million square feet and 100 acres for office space. These sites are either connected or within a short walk of the initial build-out.
- **Mixed-use waterfront development** along the Cuyahoga River and Lake Erie waterfronts to meet additional demand for downtown housing, shopping, restaurants, entertainment venues, bicycle and walking trails, and waterfront parks.

For more information and visuals on the initial build-out and the expansion opportunities, see pages 4-7.



## FIRST IMPRESSIONS



More than \$3.5 billion in **financial incentives** from the City of Cleveland, Cuyahoga County, JobsOhio and the State of Ohio



A **highly educated, diverse workforce**, with skilled workers growing at one of the fastest rates of any metropolitan area in the nation



One of the fastest, most connected and secure business-centric **fiber networks** in the United States, offering download speeds of up to 1-gigabit per second



One of the most **attractive cost of living and cost of doing business** profiles among metropolitan areas in the United States



Unparalleled **health care and medical** capabilities and institutions, including the Cleveland Clinic, University Hospitals, the MetroHealth System, Case Western Reserve University's School of Medicine, and the Global Center for Health Innovation



Metro-area commute time of just 23.1 minutes and extensive downtown **transportation** assets, including air, rail, bus, car, bicycle and walkability





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Please consult the Appendix for additional details on each topic and for supporting documents.



To access a digital version of this proposal with added features, go to <https://www.cle-authentic.com/> Pass:216HQ2CLE!

## CLEVELAND IS A CITY SHARPLY ON THE RISE.

There's authentic momentum here, rooted in a great and storied history, and ignited by recent major developments that have accelerated our growth, provided new opportunities to our citizens and created a sense of confidence and readiness for what comes next.

So what's our story? It's a combination of factors, driven forward by many of the critical elements you'll see included in the RFP response. At its core is tremendous investment and development throughout our city and neighborhoods, to the tune of \$8 billion in downtown alone in the last 10 years, and \$33 billion throughout Northeast Ohio just since 2009. By any number of metrics, Cleveland is a city with formidable momentum.

We are a community where companies, organizations and individuals thrive, and a national model for public-private partnership that has demonstrated the ability – time and again – to tackle major initiatives and be agile and move with velocity when we see significant opportunity.

There are many areas where we authentically shine and distinguish ourselves from the rest:

- **Health care** – We're the medical capital of the United States, home of the Cleveland Clinic, the Global Center for Health Innovation and many other world-class health care institutions and innovation hubs, with more than 230,000 employed in the health care industry here in Cuyahoga County alone.
- **Solutions** – Only in Cleveland, the UnifyProject is leveraging the power of big data to create a sustainable investment system that will redefine health and drive solutions to poverty.
- **Innovation** – 22 Fortune 1000 companies call our community home, NASA has a major presence here, and we were among the first U.S. cities to invest in a 100-gigabit digital backbone.
- **Livability** – Cleveland's combination of cultural, physical and recreational amenities (such as the nation's second-largest performing arts center, a northern border that is the world's largest freshwater resource, and the nation's largest metropark system), married with our affordability, easy access and extraordinary diversity among our people, make this a place that people want to call home. And that they don't want to leave.
- **Resilience** – If the power (electric, heat, cooling, internet) goes down elsewhere in the country due to a natural disaster, cyber strike or physical attack, Amazon will still be fully operating in Cleveland, thanks to the nation's only district-wide microgrid, supplemented by a secure facility 2,000 feet underground.

Cleveland is ascending. Cleveland is a growth stock. Cleveland is a champion. Cleveland has swagger. Cleveland is authentic. And, at the center of our city, we've been saving the best place for the right partner. We believe that's you.

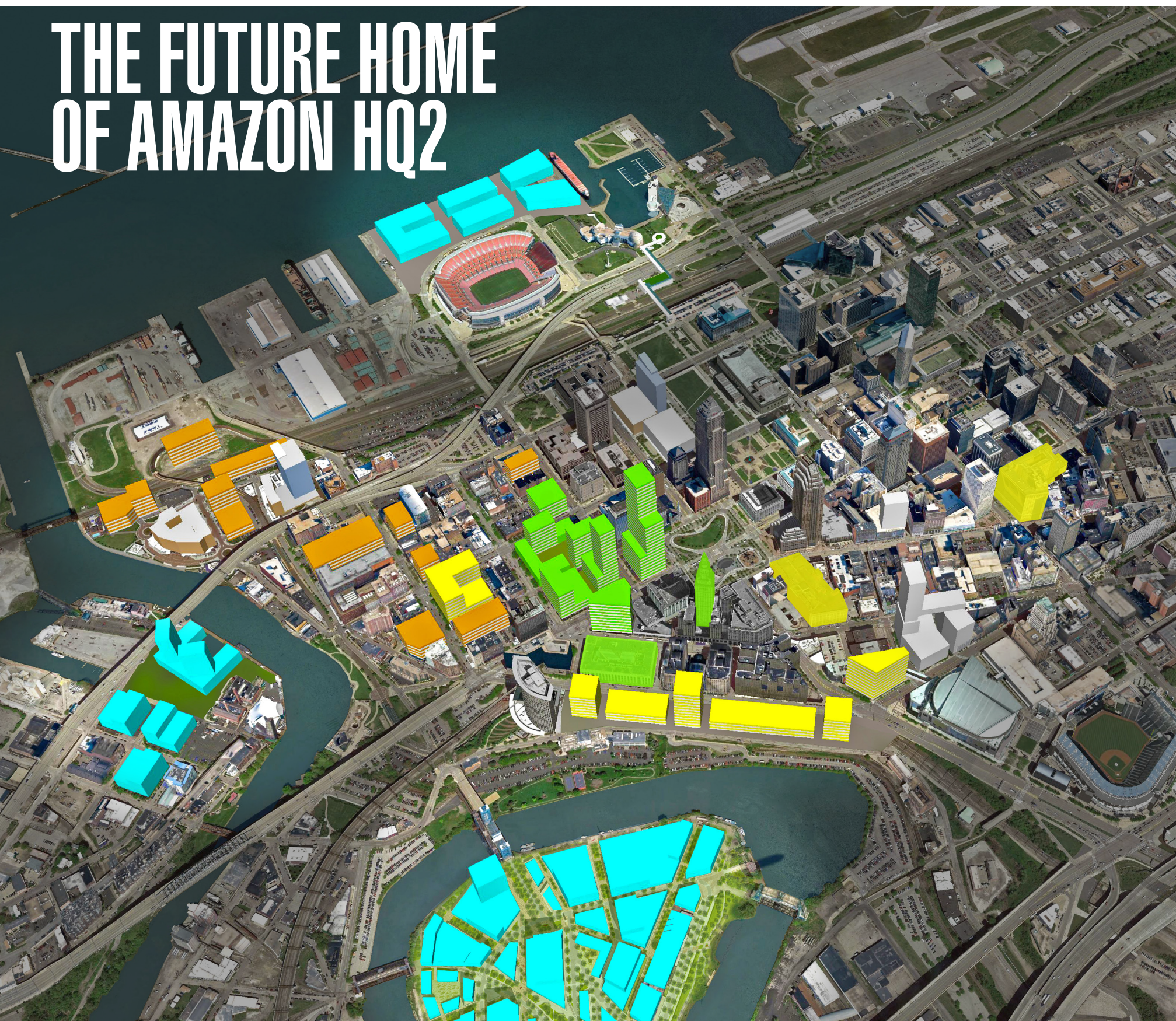
Come see our authenticity and our strength, our people and our character, our assets and our ability to help you accelerate. Cleveland would love to welcome Amazon, and together create a vibrant, thriving and exciting future.

Frank G. Jackson  
Mayor, City of Cleveland

Armond Budish  
County Executive, Cuyahoga County



# THE FUTURE HOME OF AMAZON HQ2



1

## Initial Build-Out

Amazon HQ2 will operate in the urban core of one of the nation's most recognized resurging cities and benefit from 877,000 square feet of existing space that can accommodate Amazon's immediate needs. Initial build-out will be operational while development of an additional 3.85 million square feet of new construction can take place on adjacent development-ready sites.

The core site engages directly with the \$50 million Public Square project, our city's preeminent civic space. The core site also integrates into downtown's Historic Warehouse and Gateway districts, which feature an array of housing, dining and nightlife. The core site houses the heart of the regional transit system, with three passenger rail lines at Terminal Tower and all major bus routes converging at Public Square.

2

## Full Build-Out

HQ2's second-phase growth will see Amazon more fully integrate into our city, with a development plan that maximizes flexibility and connectivity while pushing the cumulative potential build-out to over 10 million square feet.

The expanded site continues to build around the region's transit hub and connects to the core site either by a short walk or our city's Healthline, a nationally renowned bus-rapid-transit line on Euclid Avenue. Amazon will expand onto properties overlooking the Cuyahoga River and into iconic buildings that qualify for the Ohio Historic Preservation Tax Credit and Federal Historic Tax Credit.

3

## Amazon Villages

Downtown Cleveland's location along the Cuyahoga River and Lake Erie allows Amazon the ability to establish new, complementary live-work-play communities on our two waterfronts.

The downtown lakefront, Scranton Peninsula and Flats West Bank offer unique opportunities to develop extensive residential and mixed-use waterfront neighborhoods that will provide ideal housing, extensive bicycling paths and trails and amenities for the thousands of Amazon employees.

4

## Additional Development Opportunities

As Amazon's business needs continue to grow and diversify, our plan offers HQ2 the ability to further expand its footprint, with up to an additional 3.1 million square feet available for commercial and mixed-use development.

Remaining infill sites located throughout the Historic Warehouse District would further entrench Amazon's presence in the historic neighborhood, while additional sites in the Flats East Bank district – which has seen nearly \$500 million in mixed-use development to date – would stretch the company's footprint to the mouth of the Cuyahoga River.



# THRIVING DOWNTOWN THAT CELEBRATES ITS UNIQUENESS AND EMBRACES AMAZON

HQ2 will capitalize on a downtown that is far more than Ohio’s largest central business district. It is a rapidly growing neighborhood that will reach 20,000 residents by the end of 2020, providing the diverse, welcoming, walkable and amenity-rich environment that today’s highly skilled workers demand.

As part of the initial build-out, HQ2 will become part of the historic Post Office Plaza and Terminal Tower Office Complex, the iconic center of our burgeoning downtown. Completed in 1930, its grandeur has been restored as it presides over Cleveland’s resurgence. The Terminal Tower, pictured at right, is our mass transit hub as well as a terminus for the Healthline, which links the city core to University Circle, the home of globally renowned Cleveland Clinic, University Hospitals, Case Western Reserve University, the Cleveland Museum of Art and the Cleveland Orchestra.

After a historic 2016 – hosting the Republican National Convention, the World Series, the NBA Finals and more than 1 million people gathering to celebrate the Cavaliers’ first NBA championship – our downtown continues its \$8 billion development boom. We added 1,000 apartments to the market in 2017, with another 3,300 projected over the next three years.

Major employers like Key Bank, Sherwin-Williams, Medical Mutual of Ohio, Ernst & Young, Quicken Loans and IBM continue to grow, invest and add jobs in downtown Cleveland. No wonder the national and international media lauded downtown Cleveland as a city on the rise.

## Transforming Our City

Our city is reinventing itself from the inside out, presenting Amazon with a rare opportunity to join a business community and public sector renowned for their collaboration. Our private and public sectors work together to complete major projects, including the Huntington Convention Center, Global Center for Health Innovation and Flats East Bank riverfront development. We are improving our school system through the collaborative Cleveland Plan, where business, community, education and philanthropic leaders are working together to improve our public and charter schools. While the initial build-out of HQ2 will immediately bring Amazon into the downtown Cleveland community, the full build-out will continue to integrate Amazon with our city and the transformative projects that are sprouting throughout the city core.

The collaborations are fueling continued large-scale catalytic investments in our central business district including the \$140 million renovation of Quicken Loans Arena; nuCLEus, a \$400 million mixed-use development adjacent to Quicken Loans Area; Phase III of the \$500 million Flats East Bank riverfront development; the \$55 million Beacon Tower, a 20-story apartment tower on historic Euclid Avenue; and a \$135 million, 30+ story apartment tower in the Playhouse Square theater district.



## WHY IT MATTERS TO AMAZON:

Cleveland’s ability to embrace its heritage while attracting new investments from local and national interests has led to an impressive combination of urban vitality, commercial resurgence and high quality of life. HQ2 would be at the heart of our city and Amazon employees would immediately feel right at home.

## Enjoying Our Creative Culture

Cleveland’s quality of life is enriched by our robust arts and culture assets and downtown is in the heart of it all. Playhouse Square is home to the second-largest performing arts center in the United States, the Tony Award-winning Cleveland Playhouse, the Cleveland State University School of Performing Arts, and IdeaStream, a unique collaboration between Cleveland NPR and PBS affiliates. It will also be the future home of Cleveland State University’s new film school, the first of its kind in Ohio, and is just a few blocks away from the new proposed home of Amazon University (see Higher Education and Partnerships section for more information).

## Linking Our Neighborhoods and Waterfront

The city’s development and heritage are inextricably linked to Lake Erie and the Cuyahoga River, and HQ2’s Amazon Village and additional development opportunities make optimum use of our waterfront. The views of our lake and winding river are among the most picturesque on the nation’s north coast. A rich base of restaurants, entertainment venues, hotels and housing has sprouted along the waterfront, with billions of additional investment to come. The Flats East Bank is a \$500 million mixed-use riverfront development that includes over 240 apartments and numerous restaurants and entertainment venues.

Our city core is surrounded by historic, walkable neighborhoods within a short bicycle, bus or rapid transit ride of downtown employers. These architecturally and culturally rich neighborhoods embrace the city’s immigrant heritage by attracting a new diverse generation of young, skilled workers. Burgeoning neighborhoods like AsiaTown, Detroit-Shoreway, Ohio City and Tremont are within walking or bicycling distance of Lake Erie and the Cuyahoga River. In addition, a series of bicycle trails and waterfront parks connect the Amazon site to Edgewater Beach, the Cuyahoga Valley National Park and the neighborhoods.

## Building Networks and Connectivity

In 2015, Cleveland became the first city in the U.S. with a commercially available 100-gigabit fiber network. This fiber network offers businesses download speeds of up to 1-gigabit per second. Additional recent network advancements include a \$325 million upgrade to communications networks, 165 LTE upgrades to cell sites, eight Outdoor Distributed Antenna System projects to improve street-level mobile coverage and capacity, and Voice-Over-LTE, which allows for higher-quality calls, video calling and enhanced messaging services. The initial build-out is served 24 hours a day, 365 days a year by energy utilities, Cleveland Public Power and First Energy, which deliver reliability and sustainable solutions. □

## ONLY CLEVELAND...

- **HQ2 becomes part of the historic Post Office Plaza and Terminal Tower complex located in the heart of downtown**
- **Public transit hub located in initial build-out**
- **2 million workers within a 45-minute commute of downtown**
- **95,000 downtown workers and 15,000 downtown residents, more than any Ohio central business district**
- **\$8 billion in downtown investment from 2010 to 2017**
- **4,900 hotel rooms added since 2010**
- **20,000 hotel rooms within an hour’s drive of downtown**

## Uniquely Cleveland

### Microgrid Will Provide 99.999% Reliability and Energy Security With Clean Energy

Cleveland plans to provide a clean, reliable, cost-effective and sustainable microgrid to Amazon’s HQ2. Our microgrid will be based upon a localized utility infrastructure that uses distributed generation, a large combined heat and power (CHP) facility, and wind and solar energy. Cleveland’s microgrid will provide cost-effective energy security and 99.999% reliability.

Cleveland Public Power, our local municipal electric distribution utility, has capacity for underground line extension. District energy provider Cleveland Thermal has just converted its coal-fired power facility to natural gas and will have the capacity to produce 50 MW of clean electricity through a CHP plant it is building downtown. Cleveland’s access to inexpensive natural gas from the Utica and Marcellus Shale formations allows for long-term, cost-effective power generation. Ultimately, the microgrid will complement and be able to call upon the unique Lake Erie Offshore Wind project for power.

Through a partnership among city and county government, local universities, foundations and power companies, we are excited to be able to provide Amazon with the ability to disconnect from a regional power grid in times of energy disruption and remain connected to an “island” mode of energy, which will greatly enhance the energy security of Amazon’s entire operation.



# WORLD-CLASS HEALTH CARE

The Cleveland Clinic, along with University Hospitals and the MetroHealth System, anchors one of the world's most respected communities for health care delivery and innovation.

A wide-angle photograph of the Cleveland Clinic's modern medical campus. The building is a long, multi-story structure with a facade of large glass windows and light-colored panels. To the right, a taller, more angular glass skyscraper rises into the sky. In the foreground, a landscaped area features a rectangular water feature with several large, smooth, reddish-brown boulders. A low, dark stone wall runs across the middle ground, with the words "Cleveland Clinic" inscribed on it in large, white, sans-serif capital letters. A row of young, green trees is planted in front of the main building. The sky is a clear, bright blue.

Cleveland Clinic



# A SERIOUS COMMITMENT TO YOUR SUCCESS

As a powerful sign of our state- and community-wide commitment to Amazon, the State of Ohio, JobsOhio, City of Cleveland and Cuyahoga County are offering an incentive and resource support package of more than \$3.5 billion in program funds, grants and tax incentives. The structure of the incentive package provides maximum flexibility for Amazon to help build, hire and establish a thriving HQ operation in Cleveland, Ohio. Our package is targeted at driving efficiencies and lowering the capital expenditures and operating costs for HQ2.



# \$3.5 BILLION

incentive package that is flexible and aligned with Amazon's objectives

**W**hy Ohio? Discoveries are seeds of innovation that grow into further opportunity. Cultivated by its dedicated, loyal and resourceful people, the spirit of discovery is alive in Ohio. Invention, innovation and state-of-the-art initiatives are foundational elements of Ohio and every business and technology that calls Ohio home, and Cleveland is known as the City of Innovation and Industry.

This is why the State of Ohio, JobsOhio, the City of Cleveland and Cuyahoga County have all committed to providing unprecedented incentives to encourage and support Amazon's venture here, ranging from job attraction efforts to facility costs and transportation improvements to R&D expenditures. This partnership is unique in that it includes the public sector at the state, county and city levels, as well as JobsOhio, a private, nonprofit corporation designed to drive job creation and new capital investment in Ohio through business attraction, retention and expansion efforts.

Our total incentive package of more than \$3.5 billion is based on the creation of 40,600 jobs with \$4.06 billion in created payroll and \$4.6 billion in fixed asset investment by December 31, 2028.

## JobsOhio Program Funds: \$250 million

### Talent Acquisition Services: \$50 million

Strategic success increasingly depends on competitive advantage in talent markets. Amazon is an "employer of choice" nationally, and will certainly be such in the state of Ohio. Each of the talent elements outlined in the Appendix incorporates the competitive advantage into the design, with the expectation of drawing candidates nationally and from across Ohio. JobsOhio is offering up to \$50 million in funds. Amazon has the flexibility to apply talent's available options as it chooses, over a three-year service delivery period.

## Program Funding: \$200 million

JobsOhio is offering up to \$200 million in program funds to provide Amazon ultimate flexibility in addressing areas of potential risk and increasing speed to market. Amazon can apply the funds to any of the following options based on preference. Each of the programs is reimbursement-based and has already been approved by the JobsOhio Board of Directors. Reimbursement must be requested before December 31, 2025.

**JobsOhio Economic Development Grant (JOG):** Focuses on assisting Amazon with the project's fixed asset investments by providing flexible, up-front capital. Eligible uses include building, land and infrastructure.

**JobsOhio Corporate Relocation Grant:** Includes funds offered to Amazon to pay for employee relocation to the selected site. Eligible uses of funds include moving services, airfare and mileage, and short-term hotel.

**JobsOhio Research and Development (R&D) Grant:** Fosters the development and commercialization of emerging technologies and products. Eligible uses include engineering services, supplies, research and development payroll, and machinery and equipment.

**JobsOhio Revitalization (JORG) Grant:** Helps address the additional cost burden of selecting and rebuilding underutilized or vacant properties. Eligible uses include demolition, building renovation, site preparation, infrastructure, asbestos and lead-based paint abatement, environmental testing and remediation, and lab fees.

## State of Ohio Incentives: \$1.01 billion – \$1.35 billion

The State of Ohio is offering up to \$960 million for the company's initial ramp-up of 23,200 new positions by December 31, 2025, and up to \$1.01 billion in program funds with the package's full potential value estimated up to \$1.35 billion for the full ramp-up of 40,600 new positions over 15 years.

**Ohio Job Creation Tax Credit (JCTC):** Ohio's competitive advantage, JCTC is a performance-based incentive that would reimburse Amazon annually at 3.402% of created Ohio payroll for a term of 15 years, estimated at \$960 million. JCTC's value is first applied to the company's Commercial Activity Tax (CAT) and any remaining balance is awarded in the form of a check to the company. The credit is uncapped, increasing in value as the company generates additional eligible Ohio payroll. If Amazon were to create 40,600 positions and \$4.06 billion in payroll by year 10, the credit could produce an estimated total value of \$1.35 billion. Public approval by the Ohio Tax Credit Authority (TCA), which meets monthly, is required prior to the credit beginning on January 1, 2019.

**Roadwork Development (629) Grant:** Provides up to \$25 million over five years for public roadway improvements, including engineering and design costs. The grant funds up to 75% of eligible project costs. Public approval by the State Controlling Board, which meets monthly, is required.

**Ohio Department of Transportation (ODOT) Funding:** Offers up to \$25 million to support Amazon's transportation requirements. Project funding is specific to infrastructure needs. The offer of funds does not require further approval or legislative action.

## ONLY CLEVELAND...

### Ohio & JobsOhio

- Program funds of up to \$1.55 billion from the State of Ohio and JobsOhio

### City & County Incentives

- Direct incentives of up to \$803 million from the City of Cleveland
- Direct incentives of up to \$646 million from Cuyahoga County
- Direct incentives of up to \$326 million from other local government jurisdictions
- Additional \$200 million from Cuyahoga County for microgrid





**City of Cleveland Incentives: \$698.7 million – \$803.6 million**

The City of Cleveland will offer Amazon an incentive package with an estimated total base value of up to \$803,643,612. The incentive is performance-based and will increase in value as Amazon's job creation and capital investment in Cleveland exceed initial estimates.

**Direct Incentive:**

**50% Wage Tax Credit for 15 years – \$489.4 million**

**Cleveland Income Tax Credit:** The City of Cleveland will provide a refundable income tax credit of 50% of the income taxes paid by Amazon employees to the City of Cleveland. This tax credit is valued at 1.25% of the created Cleveland payroll for a term of 15 years. Based on the estimates provided to the City, the City estimates that the incentive is valued at \$489,375,000. This incentive is not capped and may increase if the total payroll increases over the term.

**Direct Incentive:**

**Tax Increment Financing Rebate Program – \$209.3 million – \$314.2 million**

**Property Tax Rebate:** The City of Cleveland will utilize its municipal authority to establish a Tax Increment Financing (TIF) program that will provide Amazon with an annual rebate of all local overlapping subdivisions, non-school property tax payments for a period of 30 years from construction of the estimated capital improvements. In 2017, the non-school share is approximately 39.399%. These funds will be distributed to Amazon or any designee and will be used for purposes designated by Amazon towards the costs of Amazon's location in Cleveland.

Based on building requirements provided, the City estimates the total value of the incentive to be at minimum \$657.4 million (at \$400/SF construction costs) up to a maximum of more than \$986.8 million (at \$600/SF construction costs). Utilizing these estimates, the City's direct investment of TIF program funds over the 30-year term is at minimum \$209.3 million and up to \$314.2 million.

In addition to the City of Cleveland, the utilization of the TIF program will generate local, multi-jurisdictional support of the balance of property tax rebate for Amazon ranging from \$448.0 million to \$672.5 million over a 30-year term. The other local jurisdictions supporting the TIF include but are not limited to: Cuyahoga County (see details below), the Port of Cleveland, Cleveland Public Library, Cleveland Metroparks and Cuyahoga Community College.

**Cuyahoga County Incentives: \$530.8 million – \$646.4 million**

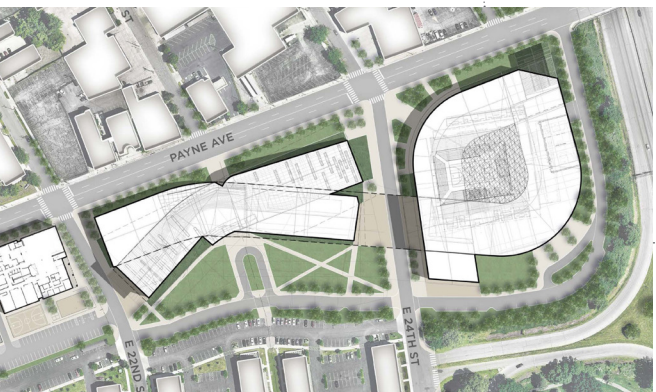
Cuyahoga County will offer Amazon an incentive package with an estimated total base value of up to \$646,437,840. The incentive is performance-based and could increase in value as Amazon's investment in Cleveland exceeds initial estimates. Cuyahoga County will also provide an additional investment of \$200 million for supporting infrastructure assets for the HQ2 operations.

**Direct Incentive:**

**100% of Sales Tax Increment for 20 years – \$300 million**

Cuyahoga County will provide a monetary incentive based on 100% of the additional Cuyahoga County sales tax revenue expected to be received over a 20-year period due to the project. The incremental revenue is estimated at \$300 million, based on Amazon adding the

10 acres  
designated  
for Amazon  
University



10 minute  
walk to  
Amazon  
HQ2

WHY IT  
MATTERS  
TO AMAZON:

We are a city, region and state proven to come together to offer companies such as Amazon substantial opportunities to reduce their capital and operational costs, drive efficiencies and economies of scale, and grow profitably.

number of jobs projected at its new headquarters over 10 years with standard economic modeling of multiplier effects. This additional sales tax revenue will be provided to the company to build/renovate headquarter sites or for other incentives of its choice, to include:

**Capital/Real Estate Expense:** Costs to build and/or renovate headquarters buildings.

**Relocation/Housing Offsets:** One-time payments to new headquarters-employees moving to Greater Cleveland to cover their moving and temporary-housing costs.

**Transportation/Infrastructure and Mobility:** Payments for free, dedicated circulating trolley service among the downtown buildings, with water-taxi service added as the site expands across the Cuyahoga River. Could include other street improvements, public transit investments or parking.

**Air Connectivity Incentive:** Subsidy for headquarters-employee airfare from Seattle to/from Cleveland until the number of new trips induces major airlines to add nonstop flights.

**Sustainability:** Payment for sustainability initiatives linked to the company's headquarters.

**Direct Incentive:**

**Tax Increment Financing Program – \$230.8 million – \$346.4 million**

**Property Tax Rebate:** As outlined herein, the City of Cleveland will utilize its municipal authority to establish a Tax Increment Financing (TIF) program.

Based on the estimated building requirements provided, the County estimates the value of its direct incentive to be a minimum \$230.8 million up to \$346.4 million.

**Additional Investment:**

**Downtown Cleveland Microgrid – \$200 million**

Cuyahoga County will build a highly resilient and reliable microgrid covering the entire Cleveland central business district where Amazon facilities will be located. The microgrid will provide reliable and

continuous electrical power and internet service. Cuyahoga County's cost to finance the microgrid, through bonding of future sales tax receipts beginning in 2028, is estimated at \$200 million.

**Other Local Jurisdictions Incentives:**

**\$217.2 million – \$326.1 million**

Based on building requirements described herein, the value of the balance of TIF program incentives generated from other local government jurisdictions in Cleveland and Cuyahoga County is estimated to range from \$217.2 million to \$326.1 million over the 30-year term.

**Direct Investment:**

**Cleveland State University – Land Commitment**

Cleveland State will provide 10 acres of land on its campus for the construction of Amazon University. The Amazon University site is a 10-minute walk from Amazon HQ2 with accessibility to bus, bus rapid transit and trolley services. Amazon University will be served by Mayor Frank G. Jackson's Higher Education Compact. The Higher Education Compact is unique to Cleveland and will vastly multiply the educational resources that any single university can provide.

**Public, Private and Philanthropic Partnerships**

Amazon will also benefit from the strength and longevity of Cleveland's public-private partnerships. For decades, these partnerships have been the genesis that delivered the transformational assets and investments that have accelerated Cleveland's global renaissance. Cleveland's philanthropic community invests millions of dollars annually in capital, education and workforce initiatives. The Greater Cleveland Partnership (GCP), our business chamber of commerce and economic development organization, provides advocacy leadership and private-sector financing for key critical initiatives throughout the community. Together, these organizations and other community partners will continue to invest in complementary real estate development projects and other initiatives that will support Amazon's HQ2. □



# LAKE ERIE'S BEACHES

In downtown Cleveland and along Ohio's north coast, 70 public beaches are a spectacular way to experience Lake Erie, the 11<sup>th</sup>-largest lake in the world.





# A WORKFORCE THAT WORKS FOR AMAZON

Cleveland is the fourth-largest headquarters and professional services cluster among the nation’s top 20 metropolitan areas and is home to 22 Fortune 1000 headquarters. Here, Amazon will find the ideal combination of a talented labor force, competitive business costs and a growing and diverse population. We are a city and a region of hard workers and big thinkers who have unlimited and unmatched potential.

With more than 2 million workers within a 45-minute drive of downtown, Cleveland leverages its proximity to other major metro areas (Akron, Canton, Youngstown) through its unique ability to attract labor from a broader than normal geography. Each day, Cleveland draws more than 200,000 workers from outside of Cuyahoga County, in part due to stress-free commuting. The average commute time in Cleveland is just 23.1 minutes, and our city ranks as one of the least congested in the nation, beating out cities such as Denver, Detroit, Nashville and Pittsburgh, as well as all of the major coastal cities. This access has contributed to headquarters and professional services growth of 18%, with more than 200,000 new workers, over the past 15 years.

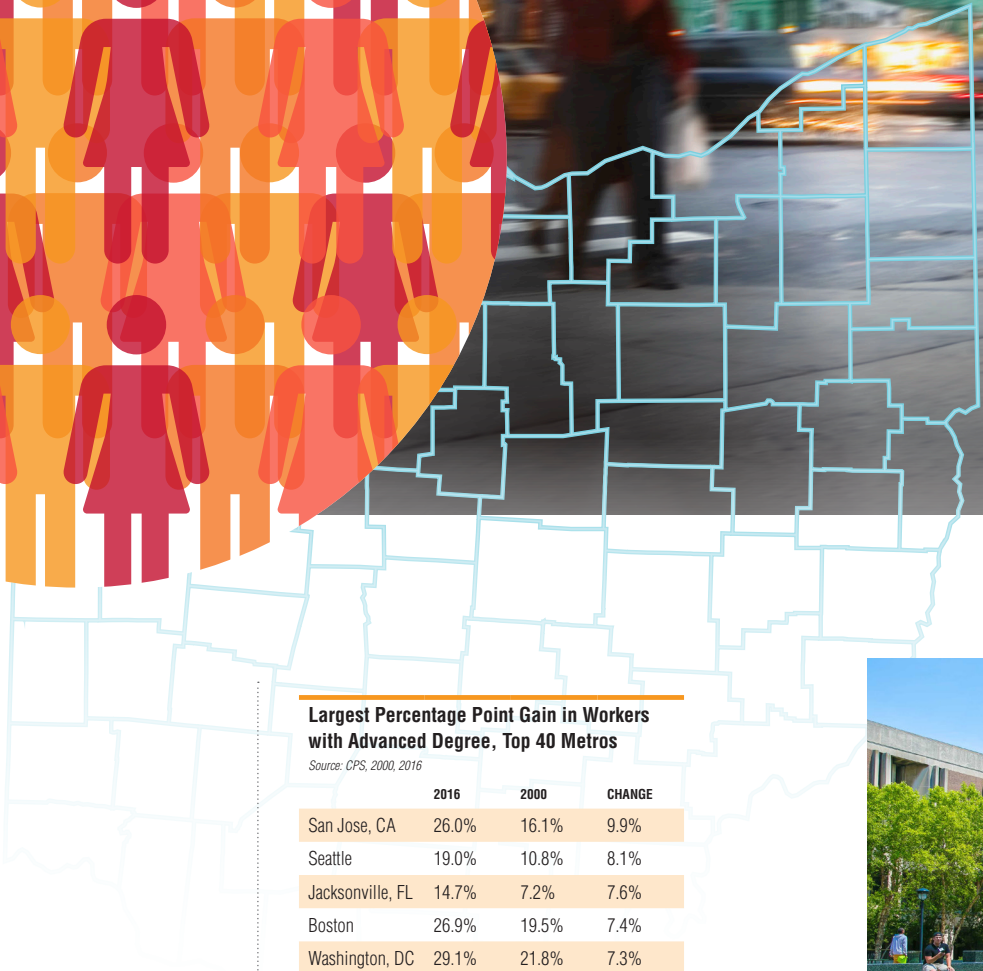
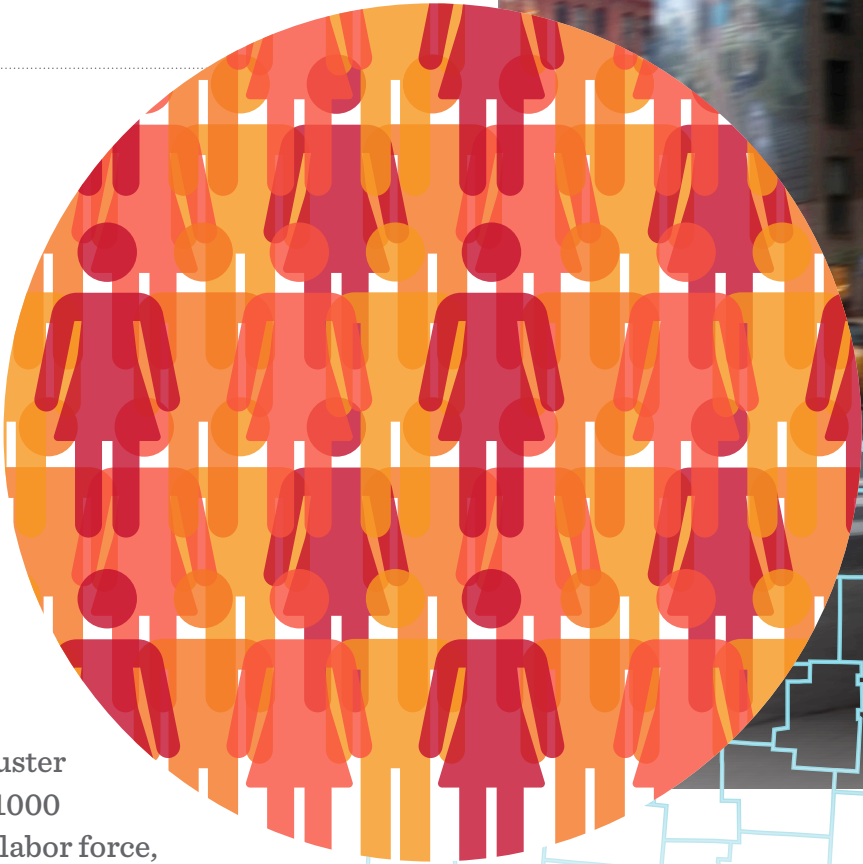
### Attracting a Diverse, Educated Talent Pool

Fueling Cleveland's professional services economy is its ability to attract highly educated, diverse talent. Out of the top 40 metropolitan areas, our region ranks sixth for the percentage of immigrants holding advanced degrees, putting us ahead of Boston. Overall, we rank 11<sup>th</sup> in the percentage of our workforce with advanced degrees. Our young adult workforce is particularly highly educated: 19.9% have an advanced degree, ranking us seventh in the country.

The trajectory of Cleveland's highly educated workforce is also on the rise: From 2000 to 2016, the percentage of the labor pool with an advanced degree went from 10.5% to 17.5%. This ranked as the sixth-largest percentage-point increase in the concentration of skilled workers in the top 40 metropolitan areas since 2000.

## ONLY CLEVELAND...

- Easiest commutes of any metro area
- Salary of \$100,000 generates more spending power in Cleveland than nearly every other metro area over 1 million people
- Seventh in nation for 25- to 44-year-old workforce with advanced degrees

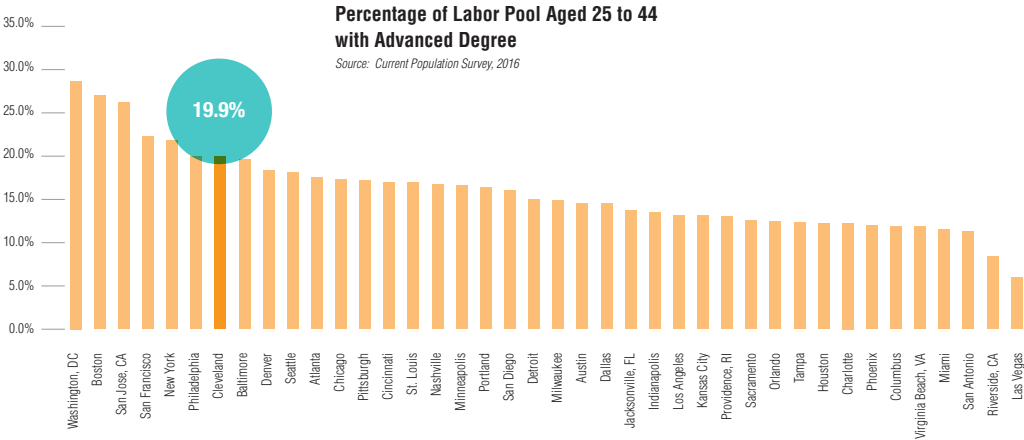


6<sup>TH</sup> highest growth in skilled workers

Largest Percentage Point Gain in Workers with Advanced Degree, Top 40 Metros

Source: CPS, 2000, 2016

	2016	2000	CHANGE
San Jose, CA	26.0%	16.1%	9.9%
Seattle	19.0%	10.8%	8.1%
Jacksonville, FL	14.7%	7.2%	7.6%
Boston	26.9%	19.5%	7.4%
Washington, DC	29.1%	21.8%	7.3%
Cleveland	17.5%	10.5%	7.0%
Charlotte	12.9%	6.0%	6.9%
St. Louis	16.5%	9.9%	6.6%
Atlanta	17.0%	10.4%	6.6%
Minneapolis	17.0%	10.6%	6.5%





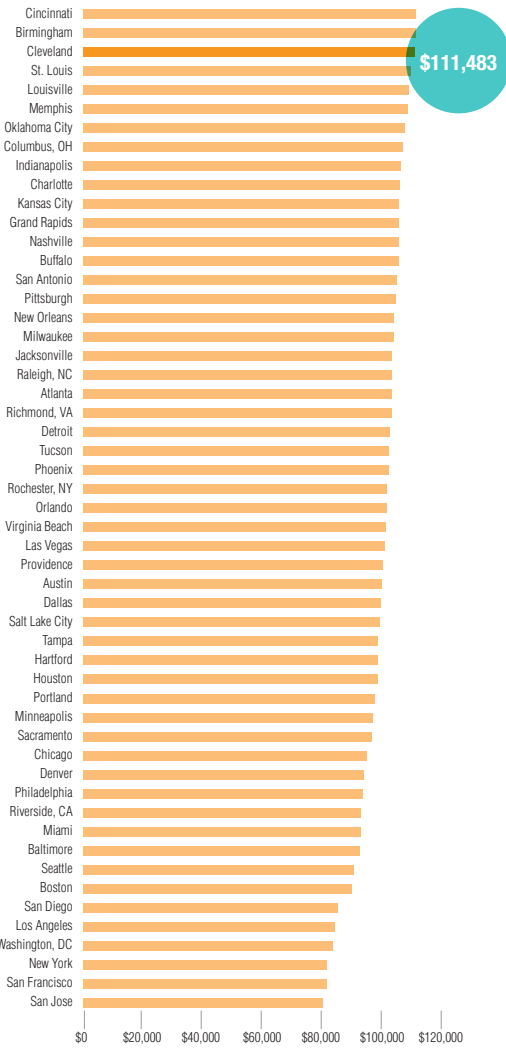


WHY IT MATTERS TO AMAZON:

Cleveland’s talented labor force, competitive business costs, and a growing, educated and diverse population are a unique combination of assets that can drive business success from Day 1 and for the long term.

What's \$100,000 Worth in Largest U.S. Metros?

Source: Regional Price Parity, BEA 2016



Cities that are affordable will increasingly be a draw. The average projected salary of \$100,000 for Amazon's second headquarters will go further in the Cleveland metropolitan area than nearly every metropolitan area over 1 million people.

Benefitting From an Attractive Wage Cost Structure

The ability to attract talent is not the only compelling workforce-related draw for Cleveland. Labor costs in the region are also significantly lower than most other major metropolitan markets. Of the top 40 metropolitan markets in the country, Cleveland's average salary of \$62,700 is nearly \$12,000 less than the group's average (\$75,200), with salaries specifically in headquarters operations 11% less on average.

Cleveland's lower-than-average cost structure means everyone's dollars are more valuable here than in most other major markets. The average projected salary of \$100,000 for Amazon's second headquarters will go further in the Cleveland metropolitan area than in nearly every metropolitan area over 1 million people. When considering regional cost differences, a \$100,000 salary in Cleveland stretches to \$111,483, compared with approximately \$80,600 in San Jose, \$82,000 in New York and \$91,400 in Seattle. In all, Amazon's wage structure will translate to a greater spending power for employees, and with that a greater quality of life. This greater quality of life, in turn, continues to fuel the talent flows into Cleveland.

Building the Talent Pipeline

Given the size of Amazon's expansion, no market in the country will be able to sufficiently serve all of Amazon's needs on Day 1. This makes a robust pipeline of emerging and future talent an essential component in the firm's value proposition.

To answer that need, Cleveland has an extensive higher education pipeline, with over 300,000 students enrolled in regional colleges and universities per year, and nearly 30,000 bachelor's or higher degrees and 13,000 associate's degrees awarded. Looking out to within 200 miles of Cleveland, those numbers swell: Colleges within this radius conferred almost 70,000 graduate degrees,

154,000 bachelor degrees and 73,000 associate degrees. (Interestingly, a quick scan of LinkedIn suggests that nearly 3,600 current Amazon employees received their education within this radius of Cleveland.)

In fields especially relevant to Amazon (IT, Business Management, Engineering and Legal), there are approximately 12,000 total graduates annually in Northeast Ohio.

Additionally, more than 11,000 international students are enrolled in undergraduate and graduate programs in Northeast Ohio. This is 5.7% of total student enrollment, compared to just 4.8% nationally, a testament to the region's commitment to a global and diverse talent pool.

Amazon is an "employer of choice" nationally and certainly will be in Cleveland. In support of that recognition, JobsOhio Talent Acquisition Services (TAS) is offering flexible funds totaling \$50 million that may be applied to the following types of talent pipeline programs: establishment of national recruiting hubs, travel vouchers for national candidates, expansion of Ohio recruitment staff, increase in recruiting advertising, execution of statewide, Amazon-specific career events, development of the Amazon Career Connector App, and other recruiting and workforce development programs.

Funds will also extend to proactive and creative efforts to tap our area's rich educational resources to help "grow" a future Amazon workforce. This will include a strong focus on academic programs in areas vital to Amazon, such as expanding Early College High Schools focused on STEM curriculum and creating Amazon University, as highlighted in the section on Higher Education and Partnerships. In addition,

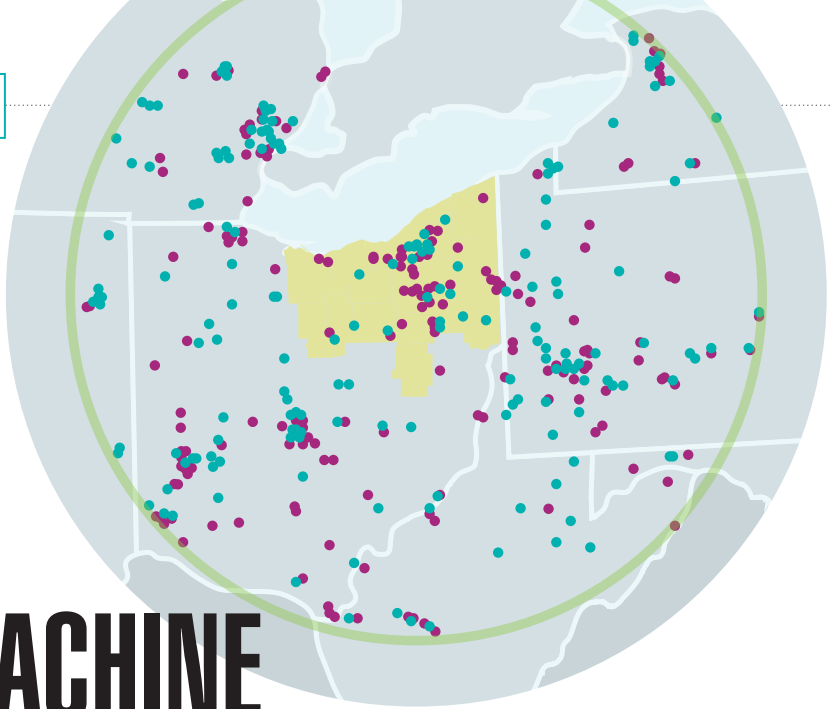
we propose to develop a program called Pathway to Amazon that will build an educational pipeline starting in select schools in the Cleveland Metropolitan School District. Beginning in eighth grade, students will be able to apply for acceptance into the program. Students will take intensive math and science courses with the opportunity to pursue dual enrollment and early college in the 10<sup>th</sup> grade. During school breaks and summers, Pathway to Amazon students will have opportunities to visit a variety of technology firms in our area.

Cleveland Rising

Cleveland is experiencing a renaissance unlike many other markets in the country, yet still has the capacity to absorb the day-to-day needs of an opportunity of this scale. This revitalization is being driven primarily by young adults who live, work, learn and play downtown and in our neighborhoods. The share of residents in the city aged 18 to 34 increased by 4.3 percentage points from 2007 to 2015, which is 13th out of the core municipalities in the top 40 metropolitan areas. This revitalization is tied to significant resettling in Cleveland's urban core. From 1970 to 2015, the number of housing units within a two-mile radius of Cleveland's downtown increased by 38%. This not only shows that the heart of Cleveland is growing, but that there is room in Cleveland to grow. This is no small asset in a nation in which so many municipalities with world-class amenities are already built out. □



# A WELL-TUNED GRADUATE AND WORKFORCE MACHINE



**25** major colleges and universities located in Northeast Ohio

**414** within a 200-mile radius

## Education Partners in the Higher Education Compact of Greater Cleveland

Baldwin Wallace University	Eastern Michigan University	Ohio Board of Regents
Bowling Green State University	Hiram College	Ohio University
Case Western Reserve University	John Carroll University	The Ohio State University
Cleveland Metropolitan School District	Kent State University	The University of Akron
Cleveland State University	Notre Dame College	The University of Toledo
Cuyahoga Community College	Oberlin College	Ursuline College

Our educational institutions also collaborate frequently. For example, CSU and CWRU have an extensive research partnership on the Internet of Things that is providing the foundation for new degree and certificate programs. And CSU and Tri-C have partnerships in Information Systems, Electronic Technology, Accounting and Supply Chain Management, among others.

Other large universities in our region include Kent State University and the University of Akron, whose signature programs include fashion design and polymer science, respectively, and The Ohio State University is just a two-hour drive from Cleveland. The Cleveland Institute of Art in University Circle produces graduates highly sought after as studio artists, industrial designers and photographers.

### Regional Educational Collaboration

The region has a unique vehicle, the Higher Education Compact, to promote collaboration among 16 public and private universities. Established by Cleveland Mayor Jackson in 2011, the Compact's goal is to increase the number of youth from the region attending and graduating from college. No other metropolitan area has an organization with this scale, scope, mission and range of partnerships.

Other collaborations are working to nurture a passion for science and technology in earlier grades. Acting on the recognition that computer science should be a foundational skill for all high school students, Microsoft, CSU and the Cleveland Metropolitan School District have built partnerships to ensure that every high school in the district has a rigorous computer science course sequence.

The city's business, philanthropic, education and government leaders are implementing a major plan to transform urban education and build a talent pipeline for the future. A new public-private fund of \$23 million is focused on our earliest learners, doubling the number of high-quality pre-K opportunities available. Additionally, a joint effort is underway to bring the Say Yes to Education initiative to the city's schools. Our Say Yes partnership will make us the program's fourth city and provide our students with the academic and social support services necessary to graduate prepared for postsecondary education. □

## WHY IT MATTERS TO AMAZON:

Amazon will need a regular flow of workers with skills in management, engineering, software development, legal and accounting, and also resources to provide continuous training. Northeast Ohio has strong higher education resources to provide that skill-building at varying levels of complexity and a history and culture of working with corporate partners.

**N**ortheast Ohio has 25 major colleges and universities, from large research universities to small liberal arts colleges, and Cleveland hosts three that demonstrate the range of options for students – and employers.

### A Wide Range of Options

**Case Western Reserve University (CWRU)** is a top-ranked private research university, with graduate programs that include engineering, law and management. Research revenues last year were about \$380 million, with almost 1,500 projects funded by the NIH, NSF, NASA and others, producing 280 inventions with over 270 industry partners. CWRU recently created a 50,000-square-foot innovation center called “think[box]” that offers the space, guidance and technology – including 3-D printers and laser-cutters – needed to transform ideas into products. It is the nation's single largest university-based innovation and entrepreneurship center and befits a university whose management school was a pioneer in both Managing by Designing and Business as an Agent of World Benefit.

**Cleveland State University (CSU)** has grown remarkably as a research enterprise in recent years. According to the 2015 Chronicle of Higher Education Almanac, CSU led all U.S. universities in increased research spending in science and engineering between 2004 and 2013. CSU was first in the nation in total research funding growth, first in federal research funding growth, and 12<sup>th</sup> in corporate research funding growth. CSU's 17,000 students are attracted to its “Engaged Learning” mission, which thrives on over 250 partnerships that include the Cleveland Clinic, NASA Glenn Research Center, Sherwin-Williams, GE, Rockwell Automation and many of the region's major employers and community organizations.

**Cuyahoga Community College (Tri-C)** is the largest public community college in Ohio and confers more associate degrees than any other in the state. It also creates customized training programs for local employers and offers more than 600 workforce and professional development courses each year in areas such as IT, project management, finance, accounting and leadership. TrainingIndustry.com has selected Tri-C as a Top Training Company in Workforce Development each of the last five years. Tri-C has an entire suite of fast-track tech programs and certifications through its IT Center of Excellence and offers certification through classes in data analytics or software development and programs like its Cisco Technical Training Institute.

## ONLY CLEVELAND....

- Northeast Ohio has 25 major colleges and universities
- 300,000 students are enrolled in Northeast Ohio colleges and universities
- Nearly 30,000 bachelor's-plus degrees and 13,000 associate degrees awarded
- 30% of degrees granted were in business, engineering, law and computer-related fields

## Uniquely Cleveland

### Creating Amazon University

Spread over 10 acres adjacent to Cleveland State University's downtown campus and blocks away from HQ2, Amazon University (AU) would bring together the capabilities of the 16 colleges and universities that are partners in Cleveland's Higher Education Compact to develop a completely tailored training and development program. AU would be based in an educational park featuring a 100,000-square-foot, five-story, eco-efficient facility, a meeting and event center with a capacity of up to 6,000, and a K-12 school with a globally accredited International Baccalaureate program.

The participating institutions will work with Amazon human resources leadership to create an educational program that builds and reinforces both desired skills and culture. In addition, the schools would partner with Amazon to create an “Amazon track” within each identified discipline. Students in these tracks would take a series of courses co-created by Amazon and faculty fellows and be connected to various career development opportunities at Amazon.

Amazon University would give Amazon a powerful tool for building and developing its future workforce, both in Cleveland and around the world.







## THE EMERALD NECKLACE

The Cleveland Metroparks encircles our city with 23,000 acres of green space, including 18 reservations, eight lakefront parks and 300 miles of trails – and countless recreational choices for residents.



# TAKE THE EASY WAY HOME TO, FROM AND AROUND CLEVELAND

Cleveland is strategically located to maximize access to more than half of the U.S. Fortune 500 headquarters in the United States and 43% of the nation’s population. Fed by an ample supply of interstate highways, our region hosts a wide variety of transportation assets, including public transit, commercial rail, international and commuter airports, and a growing port that is a leader among its Great Lakes peers.

A headquarters located in Cleveland is well positioned to serve significant portions of the nation. Cleveland is within a day's drive and an hour's flight to nearly half of the country's population and a third of Canada's.

Air Travel

Cleveland is home to two full-service airports – Cleveland Hopkins International Airport and Burke Lakefront Airport. Additionally, Cuyahoga County Airport is less than 16 miles away from downtown, and the Akron-Canton Regional Airport is less than one hour and just 50 miles south of downtown Cleveland.

Downtown Cleveland is connected by 11 miles of interstate to Cleveland Hopkins. Total travel time to Cleveland Hopkins from the central business district is less than 20 minutes by car and less than 30 minutes via public transit. Burke Lakefront is located immediately adjacent to the central business district and is accessible in less than five minutes by car, or 15 minutes by transit or walking. Together, the four airports serve over 50 North American markets and international destinations, including New York City, Washington D.C., San Francisco, Seattle, Toronto and Reykjavik, Iceland. Cleveland Hopkins is currently in direct communications with two additional international providers.

Public Transportation

Public transit is an important aspect of any transportation network, and Cleveland's public transit system is the largest in Ohio and one of the largest in the United States, serving more than 200,000 weekday customers and nearly 50 million annually. It features bus, commuter bus, bus rapid transit, light and heavy rail, paratransit, trolley and a water taxi. Our region boasts the nation's fourth-largest bus-rapid-transit system, which has received international acclaim and helped revitalize a key thoroughfare linking downtown to our world-class health care and cultural amenities.

Cleveland transportation plans include a future rail network expansion that will triple capacity. The plan will expand the current 37 miles of commuter rail to 111 miles, and stations will increase from 50 to 162. As Amazon's HQ2 home, Cleveland will accelerate the expansion to achieve build-out by 2029 in tandem with the development timetable. We are working to make one of the best systems in the country even better.

Initial build-out of Amazon HQ2 will be located in the center of downtown at the historic Post Office Plaza and Terminal Tower facilities. This location provides unmatched access to public transportation, as Cleveland's main public transit hub is located within the complex. The hub



provides direct rail access to Cleveland Hopkins and Burke Lakefront, Cleveland neighborhoods and surrounding suburban communities. In this location, employees will be able to directly access all modes of public transit, as the vast majority of routes begin and end there.

Passenger Vehicles and Private Vehicle Services

Our region enjoys a robust transportation system, anchored by nearly 11,000 miles of interstate highways, arterial and local roads. The roadway system was initially designed for a much larger centralized population, with the ability to easily absorb an additional million people region-wide. The primary interstates in our region are I-90, which is the longest interstate in the United States, I-77, I-71 and I-80, which is the only toll road in the region. Interstates that circumnavigate portions of our community include I-271, I-277, I-480 and I-490.

Amazon employees and visitors will enjoy some of the most convenient commutes of any major metropolitan area in the country. In Cleveland, the average commute is 23.1 minutes, largely due to morning and evening congested peak periods that last only 1.5 hours, and the average daily delay per capita due to traffic congestion is less than four minutes. Thus, Cleveland is one of the least congested cities in the nation.

Biking and Walking

Active transportation is another key piece of Cleveland's transportation system. With more than 860 miles of trails and other bicycle facilities and an expansive sidewalk coverage, the city has tremendous options to use to get around town.

Cleveland's bicycle commute rate is more than double the state average and has increased 238% since 2000. We have integrated bicycling with transit via a Rack-N-Roll program begun in the 1990s, which allows bicyclists to use a bike rack on the front bumper of every bus, and we have expanded it to rail and BRT. Last year, we launched the UH Bikes Cleveland Bike Share program, which includes 250 bikes at 29 fixed stations and seven “drop zones.” This new program is expanding easy access to bicycles for visitors and residents alike. Cleveland also offers a full-service bicycle parking and commuting center. Referred to as The Bike Rack, it provides riders with services such as secure bike parking, lockers, showers, a repair shop and rentals all within a five-minute walk of the city's entertainment and sports venues.

Downtown Cleveland is also extremely walkable. The city's walk score of 91 is the highest designation by Walk Score and illustrates the ease with which people can navigate downtown. Additionally, Cleveland's bordering neighborhoods received high walk scores, allowing residents to easily commute to and from the city center. □

## WHY IT MATTERS TO AMAZON:

Cleveland's transportation infrastructure will provide a high quality of life for Amazon and its employees and convenient access to national and international business destinations.

## TRANSPORTATION BY THE NUMBERS



**\$15.8** billion devoted to transportation improvements over the next 20 years



**50+** markets and 7 international destinations served by 4 national airports



**773** miles of on-road bicycle lanes and 453 miles of off-road trails



**4TH** largest bus-rapid-transit system



**238%** increase in bicycle commuting rate since 2000

## ONLY CLEVELAND...

- Downtown access to three major interstates, two airports, three transit rail lines, two BRT lines, 50 bus routes and Amtrak
- 56% of Fortune 500 U.S. headquarters within an eight-hour drive
- 1.3 million residents can access public transportation in less than 10 minutes
- Seventh-fastest growth among U.S. cities for bike commuting
- Downtown walkability score of 91



# INVENTED HERE, MADE HERE, SOLD EVERYWHERE

With a strong innovation and entrepreneurial ecosystem, Cleveland has emerged as one of the 50 most entrepreneurial-friendly cities in the entire world.

## ONLY CLEVELAND...

- First city in the U.S. to directly connect downtown and airport by rail transit
- First region to create a consortium of philanthropic organizations (60+) dedicated to economic development
- First community foundation in the country – The Cleveland Foundation
- First Great Lakes seaport to provide containerized shipping direct to/from Europe
- Home to the Cleveland Clinic, which pioneered dialysis, coronary artery bypass surgery, and kidney and face transplants; first to identify carpal tunnel syndrome and discover a gene mutation associated with heart attacks
- 30%+ of entrepreneurial leaders of region's growing companies are women or people of color

Innovation in Cleveland is being nurtured through more than 50 maker spaces, accelerators, incubators and entrepreneurship programs – leveraging our many assets in the corporate, university and startup communities in information technology, IoT, advanced materials and electronics, health care and additive manufacturing.

Northeast Ohio's 22 Fortune 1000 headquarters all have local R&D centers and teams, and the region's five research universities, five-plus major medical research institutions, 15 liberal arts and community colleges, and NASA Glenn Research Center are connected and working together to accelerate tech transfer, technology commercialization and student entrepreneurship. As evidence, these organizations have received more than 20,000 patents in the last 17 years.

Entrepreneurship is thriving as well. Our startup companies have created more than 10,000 jobs since 2004 and raised more than \$2.2 billion in capital. They have grown to contribute more than \$4.5 billion in impact on the Ohio economy since 2010, according to Cleveland State University IMPLAN Economic Impact reports. Cleveland is home to JumpStart, a public-private partnership that provides venture capital and intensive, high-impact assistance to diverse entrepreneurs and small business owners. And we are soon to become home to Plug and Play, one of the nation's top technology accelerators, and the more than 30 early-stage companies it assists annually. Tech companies such as IBM Watson, Hyland Software and OnShift have been able to accelerate their growth and access to talent as a result of partnerships with local universities and support for coding boot camps such as TechElevator, Software Craftsman Guild and We Can Code IT. These programs are focused on providing programming and systems engineering skills training for women, youth, underemployed adults, and people of color.

Hundreds of events occur each year in which large company innovators, inventors, entrepreneurs, investors and others in the ecosystem are able to find like-minded individuals and community to inspire and energize. In addition, national recurring events such as Industry: The Product Conference, The Cleveland Clinic's Innovation Summit, Content Marketing World, and JumpStart's Startup Scaleup event are further driving innovation, tech and entrepreneurship. □

## Uniquely Cleveland



### INNOVATING FOR OUR FUTURE

#### An Unparalleled Digital Agenda

Cleveland is on the path to transforming into the most wired city in America. Thanks to public-private partnerships, Cleveland became home to the nation's first commercially available 100-gigabit fiber network, which covers a 1,600-acre area from downtown (including the proposed site for Amazon HQ2) to Case Western Reserve University, and includes the Cleveland Clinic and University Hospitals. Cleveland has also launched the Connect the Unconnected pilot program to connect low-income households by bringing them online, supporting digital literacy and providing job training.

#### An Investment Model for Ending Poverty

Poverty is unacceptable, unnecessary and unsustainable. The goal of the UnifyProject is to shift from a charity to an investment model, and build an inclusive economy that empowers all to live in prosperity. The project focuses on using big data to drive efficiency in redefining health, optimize the use of resources, and reshape the medical and health care world to invest in and ensure sustainable, scalable solutions.

#### Partnership Aiming to Make Cleveland a Leader in the IoT Revolution

Cleveland State University and Case Western Reserve University are partnering to expand research and educational opportunities in the Internet of Things (IoT). This public-private university partnership is helping to make Cleveland a leader in the IoT revolution, expanding the development of new innovations, increasing technology transfer and enhancing economic investment.

#### A Center for Health Innovation, Right in the Center of Cleveland

The Global Center for Health Innovation is the only facility of its kind, a gateway to host and engage the finest medical and health care institutions and companies. The Global Center currently partners with 45 of the world's leading health care, health IT and medical innovation brands (including GE Healthcare, Siemens, Philips, Cisco Systems and Cardinal Health) in a 235,000-square-foot location, which is adjacent to the state-of-the-art Huntington Convention Center.

#### One of the First Undergraduate Programs Nationwide in Data Science

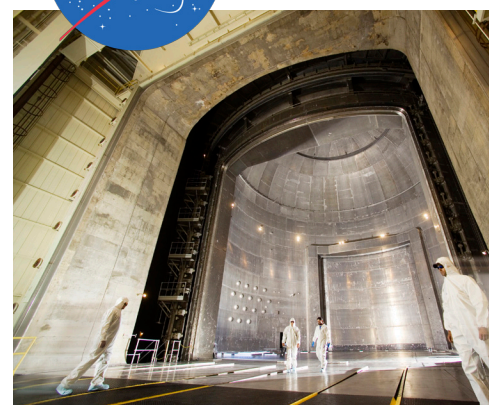
Case Western Reserve University offers a bachelor of science program in data science and analytics, which provides students with the instruction, skills and experience needed to understand and handle large amounts of data for conversion to actionable information. The degree program has a unique focus on real-world data and applications.

#### Innovations that are out of this World

The NASA Glenn Research Center designs and develops innovative technology to advance NASA's missions in aeronautics and space exploration. NASA Glenn's highly skilled workforce is focused on researching and testing game-changing technology that will enable further exploration of the universe and revolutionize air travel.

## WHY IT MATTERS TO AMAZON:

Entrepreneurship directly contributes to a company's financial gain and helps drive the local economy. Entrepreneurs are innovators, and a supportive climate can deliver a multiplier effect to the level of innovation.







## LEGENDARY MUSIC AND ARTS

The Cleveland Orchestra consistently ranks among the world's top five orchestras. It shares its century-long tradition of excellence with its next-door neighbor, the Cleveland Museum of Art.





## WHY IT MATTERS TO AMAZON:

Cleveland's exceptionally high quality of life and sense of community will position Amazon to attract and retain the 50,000 people necessary for HQ2.

# A CITY OF CHOICE AND CHOICES

## WHAT MAKES A CITY GREAT?

While some feel that a city's greatness is determined by the number of skyscrapers, the success of the sports teams or even the number of residents – the ultimate measure of a city's greatness should be the quality of life it offers. A great city offers choices, and connects its people to a wide variety of world-class options in housing, education, entertainment, recreation and culture.

## ONLY CLEVELAND...

- Home to about 120 ethnic groups who speak more than 60 languages
- World-class arts and cultural institutions including Playhouse Square, Cleveland Orchestra and Cleveland Museum of Art
- Lake Erie, Cleveland Metroparks and Cuyahoga Valley National Park provide outdoor recreation options to suit all interests
- 3 major sports teams located within a 10-minute walk of the HQ2 site

A strong sense of place and community matters more than ever when it comes to talent attraction and retention. Regardless of your interests, age, nationality, race or sexual orientation, Cleveland offers a high quality of life and a unique sense of community. From a thriving downtown and distinctive center city neighborhoods, to a 33,000-acre national park and 26 acres of downtown waterfront recreation space, the amenity and lifestyle choices that Cleveland offers give employers a leg up in attracting and retaining talent.

### Love Where You Live

Amazon will find that Cleveland's downtown is much more than a central business district. It is a rapidly growing, amenity-rich neighborhood that continues to attract a young, talented workforce. Downtown Cleveland was rated a "Walker's Paradise" by Walk Score, and is home to 380 restaurants, bars, cafes, shops and entertainment venues, making it the ideal location for new residents to settle down, and former Clevelanders to come back home. Fueled by the preservation and redevelopment of historic properties, the downtown population grew from 6,480 residents to over 15,000 from 1990 to 2017. Over the last 15 years, the number of 25- to 34-year-olds increased by 80% and the number of four-year or advanced-degree holders increased by 141%.

Cleveland's welcoming, vibrant neighborhoods extend beyond downtown, attracting a diverse and skilled workforce. Neighborhoods like Ohio City, Tremont, Detroit-Shoreway and AsiaTown boast chef-driven and immigrant-inspired food scenes, all within a short bus, rapid transit or bicycle commute of downtown. University Circle, the fourth-largest employment cluster in Ohio, is home to the world-renowned Cleveland Museum of Art and Cleveland Orchestra and a walkable district of housing, restaurants, shops and cafes. Some of the nation's top health care facilities including the Cleveland Clinic and University Hospitals are also located in this neighborhood.

#1 best beer city in the U.S.  
Source: Conde Nast Traveler



#7 best food city in the U.S.  
Source: TIME



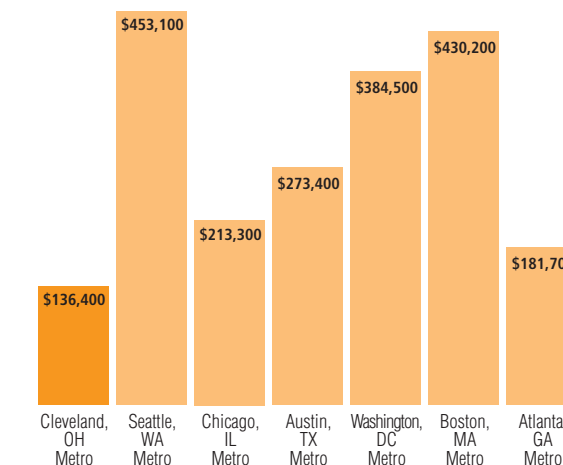
150 parks, playgrounds and green spaces  
Source: City of Cleveland



### Buy a Nice Home, For Less

In Cleveland, your employees may have a better chance of purchasing their dream home than in almost any other major metro area in the nation. Median home prices are significantly lower here, with the vast majority (89%) priced at or under \$299,000. What's more, these affordable housing options are located in communities that feature some of the state's top-rated school districts. Five local communities – Solon, Rocky River, Beachwood, Broadview Heights and Bay Village – rank among the top 15 school districts in the state. A variety of outstanding educational opportunities, including top-tier public, private, charter, International Baccalaureate and religiously affiliated schools, allow families and students the ability to choose the best educational and cultural fit.

### Median Home Price



Source: Zillow

### Work Hard, Play Hard

Clevelanders work hard, but they also know how to have fun. From the Cuyahoga Valley National Park to Severance Hall, the home of the world-famous Cleveland Orchestra, the city has something for everyone.

Cleveland's Lake Erie access is ideal for sports such as kayaking, fishing, jet skiing, boating and swimming. The region's comprehensive network of parks and trails includes the 100-mile Towpath Trail and the 23,000 acres of the Cleveland Metroparks. In addition to bicycling and hiking, the Cuyahoga Valley National Park offers downhill skiing and winter activities. The Cuyahoga River hosts the region's collegiate and high school crew teams. And golf enthusiasts have a choice of 86 courses located within 20 miles of the city's center.

Our cultural and arts scene features institutions such as Playhouse Square, the second-largest performing arts center in the country; Cleveland Museum of Art, one of the top art museums in the nation; and the one and only Rock and Roll Hall of Fame and Museum, just to name a few.

Sports are also a large part of what makes our city special. Cleveland is home to NFL, NBA and MLB sports teams, two minor-league baseball teams, an arena football team, minor-league hockey team, and a D-league basketball team. The Pro Football Hall of Fame in Canton is less than a one-hour drive from downtown Cleveland.

### Welcome to Cleveland

Cleveland is a place where everyone can feel welcome. The city is home to 120 or so ethnic groups who speak more than 60 languages, making Cleveland a beautiful melting pot that represents the diversity of our country. The Global Cleveland center helps attract, welcome and connect international newcomers to economic and social opportunities in and around Cleveland.

African American heritage is woven into the fabric of the city. Perhaps best known is the election of Carl Stokes in 1968 as the first African American mayor of a major U.S. city, but contemporary initiatives abound to transform education and make economic, community and workforce development more inclusive.

Cleveland is also proud to actively support the LGBTQ community, best illustrated by the region's hosting of about 10,000 athletes from 60 countries for the 2014 Gay Games. Following Cologne, Germany, and preceding Paris, it was the most economically successful in the Games' 32-year history. The city also hosts an annual Pride event, which celebrated its 28th anniversary in 2017. □



# CLEVELAND TIEBREAKERS



## HEALTH CARE CAPITAL

Cleveland is a hub for health care innovation, leveraging the CWRU School of Medicine and three highly ranked academic medical centers, including the Cleveland Clinic. In addition to their own commercialization efforts, they are partners in BioEnterprise, which has helped attract over \$2 billion in investments in more than 350 bioscience and health IT startups. The one-of-a-kind Global Center for Health Innovation brings them and 45 of the world's leading health care, health IT and medical innovation brands together in a dedicated, 235,000-square-foot building.



## ATTACKING POVERTY

The UnifyProject is the most broad-reaching effort ever mounted to use big data, artificial intelligence and machine learning to end poverty. Founded by the creators of Cleveland-based IBM Watson Health's Explorys, the world's largest platform of health care data, the project brings together the brightest minds in medicine, education and philanthropy. It offers a dynamic opportunity to utilize Amazon expertise, technologies and cloud capacity, and to collaborate on the world's most ambitious urban renewal effort.



## DIGITAL BACKBONE

With its strategic location between New York and Chicago, the Cleveland market is one of the highest trafficked internet points of presence in the world. Just blocks away from your new headquarters are all major carrier points of presence, including AT&T, Spectrum, Centurylink, Everstream, Windstream, Lightower, internet2 and more. Regional carriers have an abundance of dark fiber assets that also set our market apart, including high availability of 100-gigabit services and direct connections to Amazon's web services cloud.



## SUSTAINABLE LIFESTYLE

Amazon HQ2 will be in a spectacular downtown location. Your offices would be at the city's center, on the newly renovated Public Square, with five acres of park space out your front door. Your people would be a half-mile by foot, bicycle or train to the Cuyahoga River in one direction or Lake Erie in another, with access to watersports, apartments, restaurants, clubs, museums and more. Rather fly? Another half mile gets you to Burke Lakefront Airport.



## FAILPROOF MICROGRID

If the power (electric, heat, cooling, internet) goes down elsewhere in the country due to a natural disaster, cyber strike, or physical attack, Amazon will still be fully operating in Cleveland, thanks to the nation's only district-wide microgrid, supplemented by a secure facility 2,000 feet underground.

## THIS MOMENT IN TIME

\$33 billion in capital investments since 2009, led by manufacturing, health care and biotech, higher education, entertainment and culture, transportation and infrastructure. A revitalized downtown, where a growing number of people are living and working amid new hotels, apartments, restaurants, parks and trails, all along the waterfront. With all that development, we've been saving the best location for the right opportunity. Amazon is it.



# AMAZON, WE ARE YOUR FUTURE.



# Cleveland

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